Data Synchronization: POS and IC

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This session will focus on data synchronization between your food service POS and Campus.

The free/reduced meal status data has multiple uses, including the following list. The data is used in numerous state and federal reports as well as eligibility for additional benefits. And we mustn't neglect the importance of the meal status to the student: research links consuming a school meal with improved student performance and fewer behavioral issues.

Agenda

- **What you need to do**
  - Establish a process
- **How you will know it's right**
  - Quality assurance checks
  - Troubleshooting
- **Where to get help**
  - Guides and videos

Here is our agenda. My primary themes will be about the essential steps you need to take for the end of year and where to get help if you need it. I've worked to simplify what needs to be done and highlight the areas that merit your attention.

Meal Status & IC FRAM

- Numerous federal and state reports (including SEEK) utilize meal status from Infinite Campus

- Meal Status originates from your Food Service POS system and is synchronized with Infinite Campus on a regular basis[1]
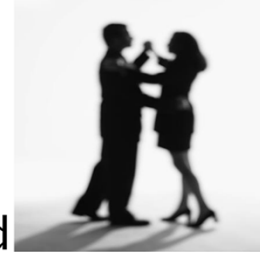
[1] Those not affected will be districts who are district-wide Community Eligibility Provision (CEP) and any district who is using Infinite Campus as their POS

Numerous federal and state reports utilize meal status from Campus, which is the system of record. For districts not using Infinite Campus as their POS or those districtwide Community Eligibility – the meal status must be imported from the food service POS.

Data Synchronization

Data synchronization is a dance: everything must be carefully orchestrated to work properly.

Finding the match – POS Data Synch

SSID XXXXXX XXXXXX XXXXXX XXXXXX **POS Data File**	→ SSID →	SSID XXXXXX XXXXXX XXXXXX XXXXXX XXXXXX **IC**

The POS file is matching against what is in IC based on a *key* field. When both key fields equal each other a successful match occurs – and a meal status record is generated in Campus.

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In a ballroom dance each partner knows the steps they must take: they have clearly defined roles. The same is true with the POS and Campus. The premise of data synchronization is that two systems share data with each other based on a common field. The data transfer occurs based on a match with that common field. Between your food service POS and Campus that common field is the student state ID. Having that information in both systems allows them to communicate with each other. Using the SSID is fast, simple and leads to fewer errors than other possible matching criteria.

CEP Data Synchronization

Data synchronization must be adjusted depending on your CEP type

Partial CEP Districts[1]

School	Action Required
Non–CEP	Upload both meal status and DC information (if using POS to import DC file)
CEP	Turn off data synchronization with Campus

Full CEP Districts

Action Required
Turn off the data synchronization with Campus

[1] IC POS users have a special setup; please contact Brad Blunt for details

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We have over 100 districts on the Community Eligibility Provision. In this provision all students eat meals at no charge. Reimbursement is based on the percentage of directly certified students in your district. Food service does not collect household applications in this case. A HIF form is collected to obtain the socioeconomic status of students and processed in Campus. As such you will need to turn off the data import between the POS and Campus. Shown above are the criteria based on your situation – partial or full CEP.

Roles and Responsibilities

- Important to clarify roles and responsibilities with your process to ensure free/reduced data is accurate and complete in IC

Major Responsibilities
- Who will **download** the direct certification file?
- Who shall **set up** the data synch between POS and IC?
- Who will **check the accuracy** of free/reduced data in IC against food service POS?
- Who will periodically **check the POS import** for success of data synchronization and resolve errors?
- How we will **communicate** if there is a problem?

At the outset of any project you need to determine who will be your resources – and what responsibilities they will have. Depending on your needs data synchronization and DC imports require a team approach. The following list – which is not all encompassing - shows some areas that need to be discussed. The goal is to promote ownership and avoid finger pointing. And if the workload can be shared that helps a great deal. Who does the work depends on the district. Some districts have their IT staff heavily involved and others rely on the food service director. The best approach is what works for your district. A key point is for proper set up at the beginning of year and perform regular monitoring thereafter.

Ready! Set! Go!

1. Stop the POS import in IC

2. Roll forward your POS for SY 15–16

KEY!

3. Change the year to 15–16 in the IC data import mapping

4. Turn the data synchronization back on between your POS and IC

Four easy steps to update your IC settings for POS data import
1. Stop POS import in IC
2. Roll the food service POS forward for SY 15-16
3. Change the year to 15-16 in your IC data import mapping
4. Turn the data synch back on in IC

Let's discuss the steps in further detail

June: Stop the POS Import

Stop the scheduled imports in IC by placing "**" in front of Host IP address after the last day of school for students

FRAM>Eligibility Import Wizard>Scheduled Imports

Data Import Detail

Active	*Import Name
☑	12-13 POS Import

*Eligibility Import Mapping
POS Import ▼

*User Name		*Password
jsmith		••••••

*Protocol	*Host	Domain
SMB ▼	**10.1.123.456	Kentucky

*Directory Path
//Imports/IC

The file name in this directory path must start with IC_Eligibility.

Place double asterisks here

Frequency Type	Frequency		Scheduled Day	*Scheduled Time
⦿ Daily	▼		▼	01:00 AM ▼
○ Weekly				
○ Monthly				

Test Connection | Test Import | Run Import

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Begin by stopping the data import after the last day of school for students. The easiest means is to place double asterisks in the Scheduled Imports tool for the host IP address– then click "Save".

Per Campus note that removing the "Active" checkbox checkmark will not stop the data import process. The optimal means is to use the double aesterisks.

Deadline

July 1, 2015

⚠️ By July 1, 2015 you must **stop** the SY 14-15 import mapping or your data may be corrupted in IC.

The data import mapping must be updated by July 1, 2015

Why? If you allow the POS to import the current school year's meal status into Campus with the prior year marked in the import mapping – then this corrupts the data in IC for the prior year

Roll Forward – POS System

- ✓ The food service director should roll the POS system forward into SY 15–16

- ✓ Any meal status from the POS should then reflect SY 15–16

- ✓ Food Service Director should notify IT staff person responsible for Scheduled Imports when this is complete

Food Service will roll their POS system into SY 15-16, preparing to process applications beginning July 1. When that is finished, Food Service should notify the KSIS contact that the POS is ready for SY 15-16

Update Data Import Mapping

- ✓ The school year will need to be updated in the FRAM>Eligibility Import Wizard for SY 15–16
- ✓ Navigate to the Eligibility Import Wizard and select your current year's data import mapping
- ✓ Click "Edit"

Eligibility Import Wizard

This wizard will guide you through mapping and importing data into the database.

Step 1. Select "New Import Mapping" to create a new import or select a saved mapping.

Saved Import Mappings

| 14-15   My POS Import |

[Edit] [Delete] [New Import Mapping] [New File Import]
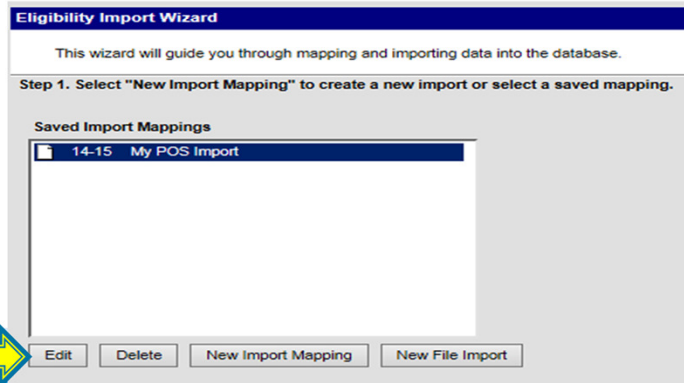
The Eligibility Import Wizard should be updated for SY 15-16. To do this:
- Navigate to FRAM>Eligibility Import Wizard.
- Select the current data import mapping and click "Edit".

Under "School Year" select 15-16. To save your changes either import a POS data extract file **or** click "Continue" if you have an existing file on the server.

Question: Will I need to update any other values for the POS data import mapping?
No, not if you are keeping your same POS system. The data values you mapped for the POS import file in SY 14-15 should remain the same.

Reactivate the Data Synch

- ✓ Remove the double asterisks to restart the synchronization
- ✓ Click "Save"
- ✓ Click "Test Connection" to ensure it works

Data Import Detail

Active	*Import Name
☑	My POS Import Mapping

*Eligibility Import Mapping
My POS Import ▾

Remove the double asterisks here

*User Name
jsmith

*Password
•••••

*Protocol
SMB ▾

*Host
**10.123.453

Domain
Kentucky

*Directory Path
//imports/IC

The file name in this directory path must start with IC_Eligibility.

Frequency Type	Frequency	Scheduled Day	*Scheduled Time
⦿ Daily	▾	▾	01:00 AM ▾
○ Weekly			
○ Monthly			

Test Connection	Test Import	Run Import

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Finally, remove the double asterisks and click "Test Connection" to ensure the import is working properly. If you changed servers then the IP address may need to be changed under "Host". Click "Save"

Checklist

- ✓ Verify your data synchronization has been stopped **before** any rollover with the POS system

- ✓ After the POS rollover re-start the scheduled import process after updating the data import template

- ✓ Check the scheduled import tool log file on a monthly basis

- ✓ Compare free, reduced and paid counts from the FRAM Eligibility report to the POS system; investigate any large differences

Here is a brief checklist of items that should be done during the POS data import update process. You will stop the data synchronization, perform the POS rollover, adjust the data import mapping to SY 15-16, and then re-start the data synchronization. The POS file import should be checked at least on a monthly basis to ensure it's working properly. Finally, you can check the free/reduced/paid counts to the POS.

Troubleshooting

Here is a set of slides to assist in troubleshooting.

POS Data Synch: What could go wrong?

Shown below are common scenarios with data synchronization:

"The data synch has stopped working"
- ✓ Confirm that the username and password are correct under Scheduled Imports
- ✓ Verify that the file path/folder name has not changed
- ✓ Confirm that a file of "IC_Eligibility.txt" is being produced by the POS server

"My free/reduced percentage appears low in IC"
- ✓ Verify all values are mapped in POS import mapping
- ✓ Check when latest data synch was done under Scheduled Imports>Scheduled Import Log
- ✓ Spot check a few students without a meal status against POS

When something appears awry, here are a few areas to check for a diagnosis. I would begin with the FRAM Scheduled Import Log. Look there to see when the last successful synch was done. If that has been unsuccessful, then you can look at what is wrong with the communication between the POS and IC. Presuming that it's worked in the past – you want to check the configuration hasn't changed: verify the username and password are correct; the folder name for the IC_Eligibilty file is still the same, a file is being produced since the rollover, and - if you have a new POS server – your IP address for the server is the same as before.

If you have low free/reduced percentages then look at your POS import mapping under the Eligibility Import Wizard: select your import mapping and import the most current IC_Eligibility file. Ensure that no values are missing from the mapping (homeless, migrant, etc.). Then you will want to verify the Scheduled Import log as well for any errors that need to be resolved.
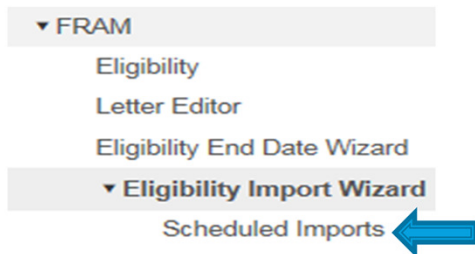
We'll discuss that in further detail.

Finding the errors

Campus tracks the status of the data import from POS
- **Path:** FRAM > Eligibility Import Wizard > Scheduled Imports – Scheduled Import Logs

▼ FRAM
    Eligibility
    Letter Editor
    Eligibility End Date Wizard
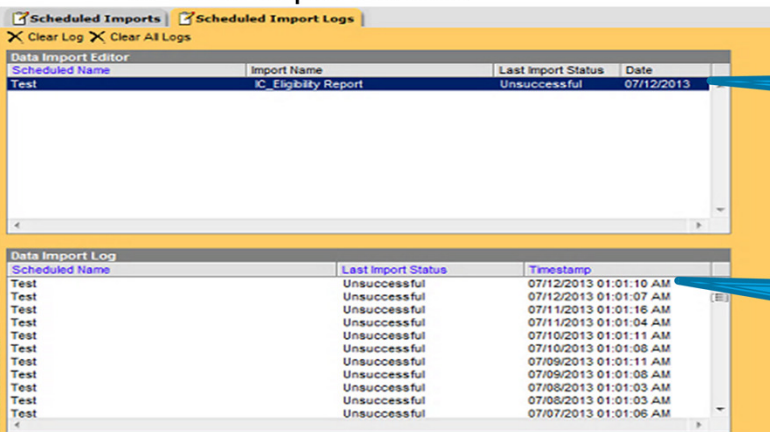   ▼ **Eligibility Import Wizard**
        Scheduled Imports

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I want to discuss the Schedule Import Log in further detail and give you resolution steps for the common errors. Locate the scheduled import log by going to the FRAM>Eligibility Import Wizard>Scheduled Imports. You may need to ask your IC contact person in the person for rights to this tool.

Finding the errors

▸ Scheduled Import Log
  ◦ 'Successful' means the data imported in
  ◦ Review **both** 'Unsuccessful' and 'Successful' import logs to search for data import errors

Click on the task name to see the details

Click on the log file to review the data synch report

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On the second tab you will click on the first entry to see the details. Then click on the latest log file to view the details. . You should review this even if you have a successful import – as you may have issues with your POS import mapping. The report shows the details of the scheduled import, as shown on the next slide.

IC Eligibility Import Report

Kentucky State
Generated on 07/12/2013 10:54:02 AM   Page 1 of 43

Eligibility Import Report

Focus on any errors/warnings

THIS IS A TEST. NO DATA IS WRITTEN TO THE DB.

Summary

New	Ended	Removed	Existing	Errors/Warnings
0	0	0	1594	13

Updated Records

Name   School Year S

Error/Warning

Line 187. ERROR 1001 - State ID '406   not foun
Line 365. ERROR 1001 - State ID '401:   not found
Line 380. ERROR 2001 - Multiple matches found for Stud
Line 400. ERROR 2001 - Multiple matches found for Stud
Line 660. ERROR 1001 - State ID '   ' not four
Line 663. ERROR 2001 - Multiple matches found for Stud
Line 920. ERROR 2001 - Multiple matches found for Student State ID   (2 matches).
Line 926. ERROR 2001 - Multiple matches found for Student State ID   (2 matches).
Line 1258. ERROR 1001 - State ID '401   ' not fou
Line 1268. ERROR 2001 - Multiple matches found for St
Line 155. WARNING 3037 -   : The record   updated with the Direct Type.
Line 156. WARNING 3037 -   : The record c   updated with the Direct Type.
Line 1203. WARNING 3037   The record c   updated with the Direct Type.

POS Import Only: Preschool student SSNs! These should have SSIDs: follow KDE data entry instructions for enrolling preschool students in Infinite Campus; incorrect SSIDs in the POS need to be corrected with what is in Campus

Duplicate SSIDs in IC; student enrollment records need to be merged

Existing Eligibility Records

Name	School Year	Start Date	End Date	Eligibility Type	Eligibility	Source	Certified Type
						Non-Direct	Did Not Apply
						Direct	SNAP
						Non-Direct	Did Not Apply

Warnings are FYI only; can generally be ignored

Here is the data import report from Campus. You'll see a similar report for the DC imports as well as the POS data synchronization. The concepts are the same: what was successful and unsuccessful. Scroll down the report until you see "Error/Warning" section. Focus on the errors.

For your POS import you are matching on the SSID from the POS against Campus. The SSIDs must be an exact match. Any mismatch will result in an error. In the example above the preschool students have a social security number assigned to them – and they should have an SSID. They need to be enrolled in Campus to obtain that. If the student has what appears to be a valid SSID and the entry of "State ID" not found appears then a discrepancy exists between Campus and your POS. Change the SSID in your POS to match what is in Campus.

Duplicate entries show as "Multiple matches" found. Merge those enrollment records in Campus. And you can generally ignore the warnings in Campus.

Resolution for Common Messages

Issue	Resolution
State ID "XXXXXXXXX" not found	Determine student SSID in IC and then assign that SSID in POS; If student is enrolled then assign SSID to student following KDE data standards
Multiple matches found for State Student ID "XXXXXXXXX"	Merge records in Infinite Campus following district policy on merging
Record contains End Date before Start Date	Ensure the data import mapping has the correct school year chosen in the Eligibility Import Wizard; Verify the POS data extract file is for SY 15–16
ERROR ##### Invalid [FieldName]	Locate the errant record: review the data import mapping to ensure all data values are mapped
WARNING XXXX	Warnings are for your info: can be viewed and generally ignored

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Here is a general overview of common errors. We've discussed the state ID and multiple matches. With the end data before the start date – you are attempting to import the prior school year POS data extract into the current school year. With an invalid field name you have a record type (e.g., Medicaid) that is being imported from your POS system but is not included on the POS import mapping. To fix this import the current POS data synch file and map the "Medicaid" value. As noted earlier you can generally ignore the warning messages.

Useful Ad Hoc Reports

Several useful ad hoc reports have been placed under the "State Published" folder in IC

- FRAM Transposed Meal Eligibility Dates
  - Locates records where the meal status data was imported into the wrong school year
- FRAM Missing Meal Eligibility Records – District
- FRAM Missing Meal Eligibility Records – School
  - High counts of missing meal eligibility records may signify a problem within the school and/or district

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KDE has assembled a list of useful ad hoc reports – and placed them under the "State Published" folder in the Ad Hoc filter tool in Campus. Here are the most helpful. The transposed meal eligibility dates shows a list of students with transposed meal eligibility dates. You can then review these further. The set of filters for missing meal eligibility records list which students do not have a meal status record. If the student doesn't have a meal status record then they will receive a default value of "paid".

Resources

Technical Reference Guidance
http://education.ky.gov/federal/SCN/Pages/Technical-Reference.aspx

Campus Community
http://community.infinitecampus.com/home/

Contact Information:
Brad Blunt (brad.blunt@education.ky.gov)

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Here is a list of resources. I will be available to assist you as well.